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ABSTRACT

This guide presents a competency-based curriculum for a high school course in sales promotion. It addresses all three domains of learning: psychomotor, cognitive, and affective. Activities suggested in the guide deal with getting along with others, with supervisors or staff members, and with small or large groups. The guide, which can be used with any teaching methods, is organized in five sections keyed to performance objectives, covering the following topics: psychology of sales promotion, sales promotion planning, budgeting for effective sales promotion, describing advertising, and describing visual merchandising. Each section contains several units promoting the acquisition of competencies needed to meet the performance objectives. Units contains resource lists, teaching activities, information sheets, evaluation questions, and answers to the questions. A bibliography completes the guide. (KC)

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SOUTH CAROLINA

GUIDE

FOR

SALES PROMOTION

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INTRODUCTION

This guide addresses all three domains of learning: psychomotor, cognitive, and affective. The following paragraphs give a brief explanation of each area.

Psychomotor

Manipulative skills such as dressing a mannequin or completing an ad layout are representative of activities that are psychomotor in nature. Each performance objective has a performance standard which must be met to prove student proficiency in the manipulative aspect of the task.

Cognitive

To perform psychomotor tasks, students must think. To dress a mannequin, the student must use color schemes and design principles. To create a radio advertisement, the student must know how to use audio tape recording equipment. In either situation, the student must think about what is being done. This involves cognition or mental activity. Cognition is what goes on in the mind about any job being done. This guide provides both the collateral knowledge and the impetus to apply cognition to psychomotor tasks.

Students gain cognition through real and vicarious experiences. They may read, view tapes, and memorize or practice a process or procedure until they are certain of it. To test his/her knowledge, a student may be required to decide the proper procedure, method, or sequence for performance. This is cognitive activity (decision making) at its highest level.

Cognition, then, is that process by which information is stored and used. That mental thought that warns one of potential dangers is cognition. Anything that goes on in the mind is cognition. Good thinking can help an employee do a job better and quicker. This guide provides for the cognitive aspects of learning.

Affective

Curriculum writers, supervisors, and instructors should try to assist students in acquiring a positive attitude toward self, job, school or fellow students. This guide seeks to provide assistance to the instructor in this area. It is difficult for the instructor to identify each aspect of desirable behavior for every unit and often harder yet to teach them. In this area, a student might be judged on the housekeeping in the work area, punctuality, and ability to carry out directions. Potential employers are interested in student attitude because an angry or uncertain person is often a poor worker.

By using this guide, the student will have participated in activities dealing with getting along with others, with supervisors or staff members, and with small or large groups.

USE OF THIS GUIDE

This guide is designed to provide job relevant competencies, performance objectives, resources, teaching activities, and achievement testing items in sales promotion. It is also designed to be used with any teaching methods you as an instructor may choose. For example, if the lecture/demonstration method is best for you, there is sufficient help to meet your needs. If you prefer to use discussions or other methods that require student participation, you will find ample help. Regardless of which method is successful for you, this guide can save preparation time and offer innovative methods and procedures. For example, a student may work either alone or on a team while in class and learn skills in direct relation to what is actually being done on the job.

The use of small groups in teaching can be helpful when many students feel inadequate due to their lack of background information. Some students may also feel that they are physically incompetent or lack the necessary background experiences. A successful program can provide students with a sense of security by reinforcing positive attitudes while improving their skills and group subject knowledge, by allowing students to interact on a group level. As students gain confidence and discover that they are an essential part of a team engaged in the learning-teaching process, their confidence increases. Individually, they also learn to work without direct supervision. In addition, use of the small-group method permits the instructor to vary instructional routines away from lecture or other full-class methods to activities for single students, pairs of students, or any number desired.

In this guide, you will find suggestions for specific classroom activities that are not meant to restrict you or your students, but only to offer a variety of learning activities for each competency.

PSYCHOLOGY OF SALES PROMOTION

UNIT: PSYCHOLOGY OF SALES PROMOTION

COMPETENCY: Describe Maslow's Hierarchy on Needs

PERFORMANCE OBJECTIVE 1:

Given basic information about Maslow's Hierarchy of Needs, the student will describe how this theory seems applicable to human beings. The discussion should include physiological, safety, social, esteem and self-actualization needs.

RESOURCE:

Stanley, Richard E. **Promotion,** Second Edition. Chapter 3.

TEACHING ACTIVITIES:

1. Ask students to collect ads that appeal to the following needs: physiological, safety, love and belonging, esteem, self actualization, and the desire to know and understand. Use the ads to illustrate how advertisers appeal to specific needs.
2. Assign the following for class discussion: Do you believe that sales promotion is important in selling automobiles, real estate, and other expensive products? Why or why not?

EVALUATION

QUESTIONS:

1. Which of the following is NOT one of Maslow's Hierarchy of Needs?
   a. Auditory
   b. Safety
   c. Love
   d. Esteem

2. Which of the following is another word for hierarchy?
   a. Assortment
   b. Consumption
   c. Motivation
   d. Ranking

3. According to Maslow, humans have five sets of
   a. emotional needs.
   b. physical needs.
   c. basic needs.
   d. biological needs.

ANSWERS:

1. a
2. d
3. c

PERFORMANCE OBJECTIVE 1

INFORMATION SHEET

Abraham Maslow published "A Theory of Human Motivation" in 1943. This widely accepted classification of needs teaches that human beings have five (5) sets of basic needs, arranged in a hierarchy (or ranking) of importance from lowest to highest. As each prior level of needs is at least partially satisfied, a consumer then attempts to satisfy other sets of needs.

Maslow arranges the needs from lowest to highest, into physiological, safety, social, esteem and self actualization needs. People have different needs at different times and more than one need can be at work at any one time. Once a need is substantially met, it no longer serves as a strong motivating force; however, another need is likely to replace it. A consumer will first try to satisfy, at least partially, their lowest level needs first and move up to the self-actualization needs, in that order.

PHYSIOLOGICAL NEEDS -- These are biological needs, such as food, water, sleep.

SAFETY NEEDS -- These are the needs for physical safety and security, for the familiar over the unfamiliar.

SOCIAL NEEDS -- Affection, belongingness and love illustrate these needs. They are at least partially fulfilled by marriage and parenthood.

ESTEEM NEEDS -- As love becomes partially satisfied, humans begin to desire such things as prestige, self respect, and status. The desire for achievement, independence and self confidence are also part of these needs.

SELF-ACTUALIZATION NEEDS -- The desire for self fulfillment is the essence of these needs. Acquiring knowledge is an example of this need.

UNIT: PSYCHOLOGY OF SALES PROMOTION

COMPETENCY: Describe how consumers needs are changed into wants for a product or service.

PERFORMANCE OBJECTIVE 2:

After assimilating the parts of the process, the activities designed to change consumer needs into particular wants for products and services will be described. The process should include both physiological and psychological wants.

RESOURCE:

Stanley, Richard E. **Promotion,** Second Edition. Chapter 3.

TEACHING ACTIVITIES:

1. Describe and discuss the influences of groups on consumer desires for clothing.
2. Assign the following situation for class discussion: Assume that you are the manager of a fast food restaurant such as McDonald's or Hardee's. Describe several consumer characteristics that your customers might have to cause them to like your products and services.

EVALUATION

QUESTIONS:

1. For most humans, love and respect are examples of what type of needs?
   a. Physiological
   b. Psychological
   c. Nurturing
   d. Self actualization

2. For most humans, bread and water are examples of what type of needs?
   a. Physiological
   b. Psychological
   c. Nurturing
   d. Self actualization

ANSWERS:

1. b
2. a

PERFORMANCE OBJECTIVE 2

INFORMATION SHEET

When consumers discover that products or services will satisfy their needs, they exhibit wants for those products or services. Wants usually lead to activities that will try to satisfy those wants.

A buying motive is the reason why a person buys a particular good or service. It is the driving force behind consumer buying behavior and may be based on physiologic or psychological wants.

Physiological wants are those based on biological needs, such as food and water. Psychological wants are based on the human needs for love, prestige and status.

STUDENT WORKSHEET

Complete the list below listing a "want" that will fulfill a need.

NEED	WANT
1. Food	1. _____
2. Clothing	2. _____
3. Shelter	3. _____
4. Transportation	4. _____
5. Water	5. _____

Suggested WANT Responses
1. Steak, lobster
2. Designer apparel, mink coat
3. Condo at the beach, luxury apartment
4. Sports car, Mercedes
5. Coke, coffee

UNIT: PSYCHOLOGY OF SALES PROMOTION

COMPETENCY: Describe the role of buying motives of consumers.

PERFORMANCE OBJECTIVE 3:

Given basic class discussion, show how buying actions are the result of motives, a term applied to a wide range of wishes, desires, needs and drives. The description should include primary, selective, rational, emotional patronage buying motives.

RESOURCES:

Lynch, Ross and Wray. **Introduction to Marketing,** Chapter 15.
Stanley, Richard E. **Promotion,** Second Edition, Chapter 3.

TEACHING ACTIVITIES:

1. Demographic characteristics can be applied in several ways. Have your students use one demographic variable, for example, age or population, and present ways this variable would be used in the marketing of certain products. Another approach would be to have the students start with a product and list the demographic variables that are important in marketing that product.
2. Use actual marketing actions to have students analyze individual and group influences on consumer behavior. Interviews are very useful here. Questions might include: Which products or services do you like or dislike? Why? How did you learn about a new product? Which brand would you buy if you were going to buy a certain product?
3. In your discussion of packaging, you might also want to ask students to bring packages to class so that the class can analyze them. Students should be encouraged to visit supermarkets, drug stores, and mass merchandisers to observe and make notes on the effect of package design on consumer behavior. Safe packaging continues to be a very important marketing issue with social implications. The voluntary actions of marketers and manufacturers to develop tamper-resistant packages is a very interesting and positive story to discuss. Stress what marketers are doing now to make packages and labels safe and helpful to customers.
4. Define types of goods. Include impulse, industrial, commercial, staple, convenience, specialty and shopping goods.
5. Define the following consumer buying motives: primary, selective, rational, emotional, patronage.

PERFORMANCE OBJECTIVE 3

EVALUATION

QUESTIONS:

1. Which one of the following types of consumer products has the most loyal customers?
   a. Convenience
   b. Impulse
   c. Specialty
   d. Shopping

2. Which one of the following types of consumer products often requires the best marketing effort to be successful?
   a. Convenience
   b. Impulse
   c. Specialty
   d. Shopping

ANSWERS:

1. c
2. b

PERFORMANCE OBJECTIVE 3

INFORMATION SHEET

Give an example of a typical consumer purchase for each of the buying motives listed below:

Primary buying motives --

Selective buying motives --

Rational buying motives --

Emotional buying motives --

Patronage buying motives --

Answers will vary somewhat, but typical examples are the following:

A consumer who does not own a food freezer may decide to purchase one to save time in grocery shopping or to save money now being lost to food spoilage. This is an example of a **primary** motive because the general type of product to buy is selected.

The consumer who has decided to buy a food freezer uses a **selective** motive in choosing a particular brand to buy. The decision to buy a particular brand will depend on various factors: dependability, performance, price or features.

A **rational** buying motive would show when a consumer buys a food freezer at a price lower than the price set on the same article by other sellers in the area.

An **emotional** buying motive would be shown by a teenage boy who buys a black leather jacket because all of his friends are wearing them.

The consumer who purchases an item from a particular store because the store offers financing, delivery and a liberal return policy is showing a **patronage** motive.

UNIT: PSYCHOLOGY OF SALES PROMOTION

COMPETENCY: Describe promotion strategies for influencing buyer behavior and attitude changes.

PERFORMANCE OBJECTIVE 4:

Given information on promotion strategies, the student will select several business strategies for discussion as examples.

RESOURCES:

Lynch, Ross and Wray. **Introduction to Marketing,** Chapter 15.
Stanley, Richard E. **Promotion,** Second Edition, Chapter 3.

TEACHING ACTIVITIES:

1. Most marketers use sales promotion activities and personal selling to generate immediate sales. However, these tools may be used to generate goodwill. Assign students to collect three ads that generate goodwill as well as promoting a product/service.
2. Here is a very effective project on perception: Have students visit a retail store and observe perceptual stimuli. What do they see, hear, touch, smell, and taste that influences their behavior? Each student should write his or her reactions. The reports should lead to stimulating class discussions on consumer perception.
3. Your discussion of packaging can include an analysis of the promotion by the paper products industry aimed at encouraging the consumer to ask for milk in paper cartons. Ads inform consumers that if they buy milk in familiar plastic bottles, their milk will lose vitamins and riboflavin before they have a chance to drink it. Paper cartons, on the other hand, allow for no lost nutritional value. Ask students to estimate the PLC stage of the paper milk carton prior to the recent promotion.
4. Students are usually interested in debating what makes a product worthy of being called new. They should discuss the concept of "new" from the marketer's point of view and the customer's point of view. They should see that "new" can range from an image of newness created by promotion to a truly innovative technological invention. Have students analyze current advertising and marketing techniques that identify new products.
5. Define the following terms:
    1. strategy
    2. buyer behavior
    3. attitude
    4. goodwill
    5. product life cycle
    6. image
    7. credible
6. Assign students to select three products that represent the following promotional strategies and to indicate the desired attitudinal changes.
    1. Credible source
    2. Repetition
    3. Drawing conclusions

PERFORMANCE OBJECTIVE 4

EVALUATION

QUESTIONS:

1. The use of a famous sports personality to endorse a particular product or service is an example of which promotional strategy?
   a. Repetition
   b. Credible source
   c. Drawing own conclusions
   d. Eminent domain

2. Showing the same commercial many times during a television program is an example of which promotional strategy?
   a. Repetition
   b. Credible source
   c. Drawing own conclusions
   d. Changing attitude

ANSWERS:

1. b
2. a

PERFORMANCE OBJECTIVE 4

INFORMATION SHEET

Several promotion strategies that have proved valuable in changing attitudes are:

1. Using a trustworthy and credible source;
2. Repeating the message;
3. Letting the audience draw its own conclusion.

Credible Source -- Credibility is a key factor in changing attitudes through promotional measures. A trustworthy source produces significantly greater attitude changes than one that is not credible. This is a reason that network television newscasters are trusted by millions of Americans to tell the news as it happens. Expertness and trustworthiness are the central requirements for news credibility.

Most salespeople are regarded as expert sources of information, although not necessarily trustworthy ones. In some cases, a salesperson must deal with the same customers over a period of time to get some degree of trustworthiness.

Repetition -- Repeating a promotional message is often beneficial to an advertiser because it tends to develop a continuity of impressions in the minds of consumers and may increase the learnings of consumers toward the advertised service or product. Everything else equal, a repeated message increases awareness and knowledge with prospects.

Retention falls off quickly when repetition is not present. The amount consumers learn seems to vary with the frequency of repetition, and the shorter the time lapse between presentations, the more information is retained.

Drawing Conclusions -- Whether or not an audience can draw its own conclusions depends on the intelligence level of the audience. For less intelligent audiences, a conclusion must be drawn or the intended attitude change will not occur. A highly intelligent audience can make its own conclusions.

SALES PROMOTION PLANNING

UNIT: SALES PROMOTION PLANNING

COMPETENCY: Describe the importance of planning as it relates to sales promotion.

PERFORMANCE OBJECTIVE 5:

Given the necessary information from class discussion, explain how planning is essentially a matter of setting objectives, improvising strategies, developing plans to carry out those strategies, measuring results, and controlling operations.

RESOURCES:

Stanley, Richard E. **Promotion,** Second Edition. Chapter 3.

TEACHING ACTIVITIES:

1. Assign the following problem for class discussion:
   Identify a product in an introductory stage. Explain what would be the most promising promotional strategy and why you think so.
2. Create a sales promotion campaign for a product while addressing the following aspects: the objectives of the campaign, the strategies and plans for carrying out the strategies, method for measuring the results of the promotion, and measures to control the operations.

EVALUATION

QUESTIONS:

1. A **target market** is
   a. a group of fashion minded individuals in an area.
   b. all children under twelve.
   c. all people over forty.
   d. a group of consumers to whom all promotion efforts are directed.

2. Planning is necessary in sales promotion because
   a. products are consumed at equal rates by consumers.
   b. businesses cannot financially afford to compete in all consumer markets.
   c. products are not used by all consumers.
   d. businesses have unlimited budgets for sales promotion.

ANSWERS:

1. d
2. b

PERFORMANCE OBJECTIVE 5

INFORMATION SHEET

To get the best results from promotions, managers must normally identify the various market segments for their products. Both short-term and long-term planning must be done, because most products and services are not consumed at equal and constant rates by all market segments. As a result, usually certain groups of consumers are selected as **promotion target market(s)**, at which all promotion efforts are directed.

The selection of the proper **promotion target market(s)** is critical to the success of the promotion program, because most businesses do not have enough money to compete effectively in all consumer markets.

UNIT: SALES PROMOTION PLANNING

COMPETENCY: Distinguish the differences between setting sales promotion objectives and setting sales promotion strategies.

PERFORMANCE OBJECTIVE 6:

Given a set of sales promotion objectives for a firm, describe how specific sales promotion strategies are developed from these objectives. As a minimum, two differences between setting sales promotion objectives and setting sales promotion strategies will be described.

RESOURCE:

Stanley, Richard E. **Promotion,** Second Edition. Chapter 4.

TEACHING ACTIVITIES:

1. Establish a promotional campaign for your local community or state. Have students determine goals and objectives for the promotion. Next, they should identify promotional strategies to be followed in achieving the objectives. Finally, they should conduct some research to discover how much it will cost to implement the promotional strategies and achieve the objectives.
2. Branding strategies are very visible and are fun to analyze and discuss. Effective learning games can be played with brand names and brand marks. Good questions include: How many can you recognize? Which brand name do you think of when a product type is mentioned? Which names do you like and why? Why can you remember some brand names and marks and not others?

EVALUATION

QUESTIONS:

1. Promotional objectives are usually set after which of the following objectives have been planned?
   a. Marketing
   b. Personnel
   c. Selling
   d. Timing

2. Promotional strategies can be considered specific ways in which to achieve the company's promotional
   a. expenditures.
   b. objectives.
   c. goals.
   d. image.

ANSWERS:

1. a
2. b

PERFORMANCE OBJECTIVE 6

INFORMATION SHEET

The functional areas of production, marketing and finance each set their objectives in relation to overall company objectives.

Promotion objectives are subordinate to and aid in furthering the marketing objectives. An example of a sales promotion objective is to get 2,000 new retail stores to carry a product in the coming year. Such an objective implies that the increase in the shelf space of a product will increase profits.

When these objectives are determined, then specific sales promotion strategies have to be planned to achieve the stated objectives. For example, if the objective is to get the product into more retail stores, then the strategy used might include more calls by salespeople, an incentive plan that gives the retailers extra profit, and more advertising directed at final consumers.

The various efforts used to achieve sales promotion results is considered the sales promotion strategy. The sales promotion objectives are set after the marketing objectives of the firm are established.

UNIT: SALES PROMOTION PLANNING

COMPETENCY: Describe the techniques of monitoring and evaluating sales promotion activities.

PERFORMANCE OBJECTIVE 7:

Given the necessary information from class discussion, explain how testing results aid in evaluating sales promotion results. Methods used to monitor and evaluate sales promotion activities will be included.

RESOURCE:

Stanley, Richard E. **Promotion,** Second Edition, Chapter 17.

TEACHING ACTIVITIES:

1. Divide the class into small groups and ask each group to prepare a list of those firms within the community that obtain publicity from actions. They should identify the actions and provide a rationale as to why the actions reflect a good image for the firm.
2. Select a business firm within the local community that is running a promotional campaign. Have students analyze each activity to determine how the company might evaluate campaign results.
3. Define the following:
    a. publicity
    b. promotional campaign
    c. promotional advertising.

EVALUATION

QUESTIONS:

1. Which of the following can be used to evaluate the effectiveness of sales promotion activities?
    a. Sales goals
    b. Sales objectives
    c. Post-testing
    d. Product testing

2. Which of the following methods might include counting the number of coupons redeemed as a measure of its effectiveness?
    a. Pretesting
    b. Post-testing
    c. Sales summaries
    d. Open to buy

ANSWERS:

1. c
2. b

PERFORMANCE OBJECTIVE 7

INFORMATION SHEET

Because there are many varieties of tests for sales promotion, it is impractical to list them all. However, they can be grouped into three general areas: pretesting, concurrent testing, post-testing.

Pretesting -- Sales promotion ideas can be pretested in order to reduce costs and improve their efficiency. Checklists can be used to determine the best consumer approach. Consumer panels can be asked for their opinions of sales promotion ideas. Attitude studies can be used to get respondents' attitudes toward promotion appeals.

Concurrent testing -- After a promotion begins, such things as the number of contest entries being received, coupons redeemed, the number of display p es put up by salespeople can be noted. A record of such items indicates some level of effectiveness of the promotion item being used.

Post-testing -- After a promotion has been run on a full scale, post-test results will include a final count of dealer orders received, number of inquiries from each source, total number of contest entries, and the total number of coupons redeemed. Records should be kept on the costs and productivity of all sales promotions so that they may be compared in effectiveness.

UNIT: SALES PROMOTION PLANNING

COMPETENCY: Describe the reasons for establishing sales promotion plans.

PERFORMANCE OBJECTIVE 8:

Given the reasons for sales promotion planning, describe how these reasons derive from the basic objectives of promotion -- to inform, persuade or remind customers to buy. Reasons for establishing sales promotion plans will be described.

RESOURCES:

Lynch, Ross and Wray. **Introduction to Marketing,** Chapter 15.
Stanley, Richard E. **Promotion,** Second Edition. Chapter 3.

TEACHING ACTIVITIES:

1. Assign the following:
   Select a store in your community to visit. Talk to someone in the sales promotion department to find out how the sales promotion staff used, or plans to use in the near future, a salesperson in a sales promotion campaign. Then answer the following questions:
   a. Did the salesperson help plan the sales promotion? If so, describe the salesperson's role.
   b. Was the salesperson involved in the actual promotion? How?

2. Define: channels of distribution.

EVALUATION

QUESTIONS:

1. Sales promotion campaigns are usually effective in which of the following situations?
   a. When a new brand is being introduced
   b. When established products are declining in sales and popularity
   c. When there is intense competition
   d. When products are losing market share

2. In which situation is sales promotion not likely to be effective?
   a. When there have been no changes to the product in years
   b. When the economy is in a recession
   c. When changes in the industry have been constant
   d. When competition is limited

ANSWERS:

1. a
2. a

PERFORMANCE OBJECTIVE 8

INFORMATION SHEET

Sales promotion attempts to move products and/or services through channels of distribution by stimulating sales and providing additional incentives to business users and consumers.

Some of the reasons for establishing sales promotion plans are:

1. A new brand or product is being introduced;
2. A major product improvement in an established brand is being promoted;
3. A brand or product is selling well and its company wants to continue the success;
4. A company is trying to increase store distribution, and sales promotion is used to help sell middlemen;
5. An extra inducement is needed to supplement advertising, to get consumers to buy in either greater quantity, or with increased frequency;
6. A method to increase sales.

Sales promotion plans are less effective if any of the following characteristics occur:

1. The products are established ones, with no improvements;
2. The established products have a declining market share;
3. The product is in an intensively competitive consumer market.

UNIT: SALES PROMOTION PLANNING

COMPETENCY: Describe the specific elements of a sales promotion plan (advertising, publicity, personal selling, and special events).

PERFORMANCE OBJECTIVE 9:

Given the following major components of a promotion plan, describe how each of the following concepts contributes to the firm's overall sales goals: advertising, publicity, personal selling, and special events. The specific elements of a sales promotion plan will include advertising, selling, special events, and publicity.

RESOURCE:

Stull, W.A. and R.W. Hutt. **Marketing: An Introduction,** Chapter 10.

TEACHING ACTIVITIES:

1. If possible, invite a representative from a local advertising agency to discuss with the class the various services that advertising agencies provide clients.
2. Using newspapers and/or magazines, assign students to select items that are representative of publicity and of advertising. Each item should be discussed and described to the class.

EVALUATION

QUESTIONS:

1. The four most common forms of promotion are
   a. advertising, publicity, personal selling and public relations.
   b. persuasion, selling, demonstrating and coupons.
   c. calling, writing, radio and flyers.
   d. telephone, direct mail, television. and visual merchandising.

2. When a business combines advertising, publicity and personal selling, the total package is called a
   a. product plan.
   b. promotional mix.
   c. standard deviation.
   d. graphic display.

ANSWERS:

1. a
2. b

PERFORMANCE OBJECTIVE 9

INFORMATION SHEET

The four most common methods of promotion are advertising, public relations, publicity and personal selling. Most businesses combine these methods to create a promotional mix.

Advertising -- The use of nonpersonal paid messages promoting a service, product or idea is an audience through various mass media by an identified sponsor. Its primary goal is to create mass demand for products or services by reaching potential buyers.

Publicity -- Like advertising, this method uses the same media -- print and broadcast - to influence the public. Publicity differs in that a business does not have to pay for the messages distributed. Stories that promote a company's products, employees or community involvement are examples of publicity. For example, promoting one employee as the "good neighbor of the month" by spotlighting their community involvement in the newspaper, on radio or television.

Personal selling -- This is direct, personal contact between a seller and a buyer. Direct contact permits sales people to help consumers buy products or services that fulfill their needs and wants. Most businesses use some form of personal selling.

Personal selling requires that sales representatives be well informed about their products and services, that they have good interpersonal skills, and that they have a clear understanding of the selling process and about customers.

Visual Merchandising -- Visual merchandising is a dominant factor in the selling process and its future is bright due to the fact that merchandise does not sell itself. It is the job of the visual merchandiser to present the merchandise and increase sales as well as to create a desirable image for the store.

BUDGETING FOR EFFECTIVE SALES PROMOTION

UNIT: BUDGETING FOR EFFECTIVE SALES PROMOTION

COMPETENCY: Define the role of a firm's promotion appropriation on the entire sales promotion program.

PERFORMANCE OBJECTIVE 10:

Given the total promotional appropriation for a company, describe how the budgets for advertising, publicity, personal selling, sales promotion and visual merchandising make the total plan dollar specific and provide the basis for control of promotion funds. The effect that a firm's promotional budget has on the entire sales promotion program should be described.

RESOURCE:

Stuil, W.A. and R.W. Hutt. **Marketing: An Introduction,** Chapter 10.

TEACHING ACTIVITIES:

1. Assign each student to contact a local representative of the media -- to compile a folder on advertising rates and specifications. In class discussion, students should exchange this information to get an idea of the costs involved in the promotion budget.
2. Define: fiscal year.

EVALUATION

QUESTIONS:

1. Promotional budgets are usually set for how long a time period?
   a. A quarter
   b. A month
   c. A year
   d. Six months

2. One factor that influences promotion budgets is
   a. banking regulations.
   b. promotion expenditures by competition.
   c. the economic value of a dollar.
   d. Federal Reserve policies.

ANSWERS:

1. c
2. b

PERFORMANCE OBJECTIVE 10

INFORMATION SHEET

The promotion appropriation is the single dollar figure that represents a firm's planned total promotion expenses on all parts of promotion for usually a year. The budgets for sales promotion including advertising, personal selling and sales promotion make up the total appropriation for promotion.

Budgets are useful in planning and control. Each manager considers how much will be spent for each activity, each product and in each market. Most budgets are prepared well in advance of the firm's fiscal year.

Factors that influence budgets are: market research, company earnings, competition, stage of the product's life cycle, and economic conditions. However, the amount the firm can afford is usually the limit on the promotion budget.

UNIT: BUDGETING FOR EFFECTIVE SALES PROMOTION

COMPETENCY: Describe the five basic ways in which companies determine their promotion budgets.

PERFORMANCE OBJECTIVE 11:

Given the basic ways in which companies determine their promotion budgets (subjective budgeting; percentage of past sales; percentage of future sales; allowance per unit; and objective task) describe the typical situation in which a business would use each. The five basic ways in which companies determine their promotion budgets will be explained to include subjective budgeting, percentage of past sales, percentage of future sales, allowance per unit and objective.

RESOURCE:

Stanley, Richard E. **Promotion,** Second Edition. Chapter 16.

TEACHING ACTIVITIES:

1. Assign the following situation for class discussion:
   Assume that you have been hired as a marketing consultant by a small private college with limited financial resources. They have asked you for suggestions about how they may communicate effectively with prospective students. The college attracts students from throughout the state and region as well as a few students from other states and other countries. Should they advertise? Use recruiters?

EVALUATION

QUESTIONS:

1. The most often used method of determining a promotion budget is
   a. subjective budgeting.
   b. percentage of past sales.
   c. percentage of future sales.
   d. allowance per unit.

2. The budgeting method that relies on intuition is
   a. subjective budgeting.
   b. percentage of past sales.
   c. percentage of future sales.
   d. allowance per unit.

ANSWERS:

1. c
2. a

PERFORMANCE OBJECTIVE 11

INFORMATION SHEET

Of the five basic ways in which companies determine their promotion budgets, the percentage of future sales is the most widely used.

Subjective budgeting -- Many executives rely largely on their judgment and experience to set promotion budgets. It is a method that is convenient with small budgets, but is only as good as the intuition of the executives that use it.

Percentage of past sales -- Both the percentage of past sales and the percentage of future sales methods assume that a definite relationship exists between sales volume and the amount of promotion dollars to produce those sales. Using a percentage based on past experience (or an industry average), a number is applied to last year's sales to get a total promotion appropriation for the budget.

For example:	Last year's sales	$ 2,876,974.00
	times percentage of 5%	x.05
	Equals promotion budget	$ 143,848.70

Percentage of future sales -- In this method, the company estimates the sales volume for the coming year and applies a percentage figure to it. This method assumes that sales follow promotion.

For example:	Planned sales	$ 3,000,000.00
	times percentage of 5.5%	x .055
	Equals promotion budget	$ 165,000.00

Allowance per unit -- Some firms, such as auto and appliance companies, use a fixed amount of money per unit in setting their promotion budgets.

For example:	Product units/production	$ 275,000
	times $ 5.00 per unit	x $ 5.00
	Equals promotion budget	$ 137,500.00

Objective — task -- Some firms set promotion objectives and then determine the tasks and specific costs needed to reach those objectives. The sum total of the individual product and/or market costs becomes the total promotion budget for the company. Although this is the most logical, a problem with this one is the time and talent that is needed to determine the various component costs.

DESCRIBING ADVERTISING

UNIT: DESCRIBING ADVERTISING

COMPETENCY: Discuss the purpose of advertising.

PERFORMANCE OBJECTIVE 12:

Given classroom discussion and information, describe advertising's purpose as part of the promotional mix.

RESOURCE:

Stull, W.A. and R.W. Hutt. **Marketing: An Introduction,** Chapter 10.

TEACHING ACTIVITIES:

1. Look through newspapers or magazines and clip an example of each of the following types of advertising: (1) promotional, (2) institutional, (3) local, (4) national, (5) cooperative, and (6) classified advertising. If possible, cut out these advertisements and mount or tape them on posterboard. For each of the five advertisements, ask the class to answer the following questions.
   a. What is the major purpose of this advertisement?
   b. Why did you classify it as promotional, institutional, local, national, or cooperative advertising?
   c. What type of appeal does the advertisement use?
   d. How effective do you think the advertisement will be? How did it attract your attention? What do you like or dislike about it?
   e. What suggestions would you make to improve the advertisement?

2. Define: promotional advertising.

3. Identify the parts of an advertisement.

EVALUATION

QUESTIONS:

1. Which of the following media accounts for the largest expenditure of the advertiser's dollars?
   a. Television
   b. Radio
   c. Magazines
   d. Newspapers

2. Sales promotion would include all but which one of the following marketing activities?
   a. Staffing trade shows
   b. Selling promotional time
   c. Purchasing or manufacturing a product
   d. Conducting a sweepstakes

ANSWERS:

1. d
2. c

PERFORMANCE OBJECTIVE 12

INFORMATION SHEET

The word advertising comes from the French term avertir, meaning "to notify." Communication is necessary for notification. Here is a good way to look at it. Advertising is simply the way a business talks to potential customers or clients about products or services. The role of advertising is to inform potential users that the product or service is available and to persuade people to try it by pointing out the benefits it offers.

Once a product is produced or a service is made available, advertising tells consumers about it. Advertising is marketing's most visible form of communication. The American Marketing Association (AMA) defines **advertising** as "any paid form of nonpersonal presentation, and promotion of ideas, goods, or services by an identified sponsor." There are four key elements in the AMA definition: (1) paid form, (2) nonpersonal presentation, (3) promotion of ideas, goods, and services, and (4) identified sponsor.

Basically, the purpose of advertising is to sell a product, a service, or an idea. The intent may be to induce action immediately or at some time in the future, but the basic objective is to sell something through the use of effective communication. The ultimate effect of advertising should be to modify the attitudes and buying behaviors of the receivers of the persuasive message.

Americans tend to take advertising for granted. But advertising serves as an important method of communication. As a marketing communications tool, it is used to inform, to persuade, and to encourage people to act. Most marketers find that advertising is an indispensable component of a marketing communications program.

UNIT: DESCRIBING ADVERTISING

COMPETENCY: Describe benefits and advantages of advertising.

PERFORMANCE OBJECTIVE 13:

Given classroom information and discussion, the benefits and advantages of advertising will be described and listed.

RESOURCE:

Stull, W.A. and R.W. Hutt. **Marketing: An Introduction,** Chapter 10.

TEACHING ACTIVITIES:

Assign the following:

1. Select a local newspaper and review its advertising to find promotional and institutional advertisements. Prepare a three minute oral presentation for the class on the differences in the two types of advertisements.
2. List five examples of various retail businesses. Design an effective sales promotion for one product sold by each firm, using the most appropriate advertising medium.
3. As the owner of a small, suburban hardware store, establish an advertising budget based on the types of media you plan to use.

EVALUATION

QUESTIONS:

1. The primary source of income for print and broadcast media is
   a. subscriptions.
   b. advertising.
   c. editorials.
   d. mailing lists.

2. One of the major purposes of advertising is to
   a. increase the sales of goods and services.
   b. create new products.
   c. provide employment.
   d. increase the cost of goods and services.

ANSWERS:

1. b
2. a

PERFORMANCE OBJECTIVE 13

INFORMATION SHEET

Advertising is an important part of the promotional mix. It is important to the total marketing effort of a business because it aids the movement of goods and services along the channels of distribution. Thus, one of the major purposes of advertising is to stimulate demand and increase sales of goods and services at all levels in the distribution process.

Advertising also serves an important social purpose. It is indirectly responsible for the high standard of living enjoyed by many people in the United States. By stimulating demand, advertising promotes the sale of more goods and services. This translates into increased employment opportunities and thus increased income or wages that can be spent on goods and services. This increase in consumption results in a higher standard of living.

Finally, advertising is a major contributor to the communications process. One of its basic functions is the transmission of information. Advertising not only communicates information about new products and services and their uses but also other essential information contained in telephone directories, newspaper classified advertisements, and legal notices. Without advertisements, newspapers, magazines, radio, and television would not exist in their present forms because advertising is their primary source of income.

In addition to these major purposes, advertising also serves a number of related but more specific purposes including the following:

1. Producing immediate sales of products or services;
2. Increasing the quantity purchased by those who are already buyers of the products or services;
3. Promoting the purchase of more than one unit of a product or service at a time;
4. Appealing to those who do not yet buy a product or service;
5. Familiarizing consumers with the uses of products or services;
6. Stressing the exclusive features of products or services;
7. Introducing new styles to the marketplace;
8. Getting customers to come into a business;
9. Preparing the way for a personal selling program;
10. Increasing sales during the off season.

Advertising efforts are undertaken by producers as well as by the various intermediaries along the channels of distribution.

UNIT: DESCRIBING ADVERTISING

COMPETENCY: Identify promotional and institutional advertising.

PERFORMANCE OBJECTIVE 14:

Given classroom information and discussion, identify promotional and institutional advertising and describe them.

RESOURCE:

Stull, W.A. and R.W. Hutt. **Marketing: An Introduction.** Chapter 12.

TEACHING ACTIVITIES:

1. Assign the following:
   Working in small groups or teams develop a promotional plan for the marketing/distributive education program at your school. Follow the identified steps and prepare a written report. Be sure to define the objectives of your promotional plan, describe your promotional mix and the factors that affect it, and explain how you will evaluate the effectiveness of your promotional plan.

EVALUATION

QUESTIONS:

1. Advertising that tries to convince potential buyers to purchase a specific product or service is classified as
   a. correctional.
   b. promotional.
   c. subliminal.
   d. institutional.

2. Advertising that attempts to generate goodwill or a better company image is called
   a. subliminal.
   b. correctional.
   c. promotional.
   d. institutional.

ANSWERS:

1. b
2. d

PERFORMANCE OBJECTIVE 14

INFORMATION SHEET

Advertising can be classified according to purpose as promotional, institutional, or advocacy advertising. **Promotional advertising** tries to convince potential buyers to purchase a specific product or service. It is also called immediate response or direct action advertising because it urges customers to buy specific items. Most advertising falls into this category. **Institutional advertising** attempts to generate goodwill or bolster a company's image. It is also called attitude or indirect action advertising because its aim is to create a favorable impression and enhance a firm's reputation. Advertisements by oil companies that discuss their efforts to help clean up the environment or utility company advertisements concerning energy conservation are examples of institutional advertising. **Advocacy advertising** is a rarely used form of advertising that presents an individual or organizational viewpoint.

The steps in completing a promotional plan are:

1. Define the objectives.
2. Choose the appropriate promotional mix.
3. Evaluate the effectiveness of promotional efforts.

UNIT: DESCRIBING ADVERTISING

COMPETENCY: Determine the effectiveness of advertising media.

PERFORMANCE OBJECTIVE 15:

Given discussion and information on measuring advertising messages, describe how the effectiveness of advertising is measured. The discussion will include methods of measuring the results on consumers.

RESOURCES:

Lynch, Ross and Wray. **Introduction to Marketing,** Chapter 15.
Stanley, Richard E. **Promotion,** Second Edition, Chapter 3.
Stull, W.A. and R. W. Hutt. **Marketing: An Introduction,** Chapter 10.

TEACHING ACTIVITIES:

Interview the owner or manager of a marketing or service business in your community. Ask the following questions.

1. How important to its success are the promotional efforts of this business?
2. Does this business have an overall promotional plan? If so, what are the primary objectives of this plan?
3. What kind of promotional mix does this business use to stimulate sales of the goods or services it markets? Which method of promotion does the business owner or manager consider the most important of the mix? Why?

EVALUATION

QUESTIONS:

1. Measuring the effects of an advertising program is usually extremely difficult because
   a. buyers do not respond immediately.
   b. numbers are hard to translate.
   c. television ratings depend on them.
   d. measuring devices are inaccurate.

2. The most common evaluation technique for an advertising period is the examination of
   a. last year's records.
   b. pretest.
   c. sales records.
   d. post-test.

ANSWERS:

1. a
2. c

PERFORMANCE OBJECTIVE 15

INFORMATION SHEET

Measuring the effects of an advertising program is extremely difficult for a number of reasons. Potential buyers may not respond to an advertisement immediately but may choose to purchase a product or service months after they see or hear it. When attempting to evaluate an advertising program, advertisers must also consider the weather, the actions of competitors, the season, and any other factor that influences buying pattern. Small advertisers do have an advantage because they are closer to customers and are better able to understand what advertising approach has the strongest appeal. They can strive to create advertisements that are tuned to the market, include the information that buyers need, and support their images and goals. In the final analysis, however, the evaluation of any firm's advertising efforts is an educated guess. There is no sure technique for determining whether an advertisement has accomplished the objectives of an advertising program.

The most common evaluation technique is the examination of sales records for the advertising period. An increase in sales can at least be partially attributed to advertising efforts.

Advertisers may conduct pretests and post-tests. Pretests often involve showing advertisements to people who are wired to electronic equipment that measures pulse rates, eye movement, brain waves, and even perspiration. Although there is debate concerning the effectiveness of such pretesting, advertisers do use these methods to help them determine if a proposed advertisement is interesting, believable, or memorable. Major advertisers may also conduct post-tests. These tests ask consumers what they remember about an advertisement and their attitudes towards it.

UNIT: DESCRIBING ADVERTISING

COMPETENCY: Identify types of advertising media: television, radio, magazines, newspspaers, specialty advertising and direct mail.

PERFORMANCE OBJECTIVE 16:

Given class discussion, identify advertising messages communicated by television, radio, magazines, newspapers, specialty advertising. The following media should be identified: television, radio, magazines, newspapers, specialty advertising.

RESOURCE:

Stanley, Richard E. **Promotion,** Second Edition, Chapter 3.

TEACHING ACTIVITIES:

1. Assign students the following:
   Give at least two examples in which it might be necessary to advertise to intermediaries. What are the objectives of the advertising in your examples?

2. Assign the following for class participation:
   Which advertising media would you choose for the following products or services? Give a reason for your choice.
   a. Local carpet cleaning service
   b. RCA television sets
   c. Tide washing detergent
   d. A formal wear rental service
   e. A landscaping service

3. Define and give two examples of the following types of advertising media:
   a. television
   b. radio
   c. magazines
   d. newspapers
   e. specialty
   f. direct mail
   g. outdoor.

4. Define prime time and drive time as they relate to radio advertising.

5. Have students examine their handbags, billfolds, book sacks, keys and other personal belongings they have with them. Ask the students to list all the kinds of specialty advertising items found.

PERFORMANCE OBJECTIVE 16

EVALUATION

QUESTIONS:

1. Print media includes
   a. transit ads.
   b. billboards.
   c. matchbooks.
   d. magazines.

2. Which of the following is **not** considered a part of broadcast media?
   a. Radio
   b. Television
   c. Billboards
   d. Cable television

ANSWERS:

1. d
2. c

PERFORMANCE OBJECTIVE 16

INFORMATION SHEET

Different kinds of advertising are suited to different kinds of products. Stores use all kinds of advertising media to get their messages across. Newspapers, magazines, billboards and other outdoor signs, transit ads, radio and television broadcasts, and various other channels for communicating advertising messages are referred to as the **advertising media** (the singular is "medium").

Print media includes newspapers, magazines, shoppers' guides, direct mail, and other printed materials. A newspaper is considered a general use product because it reaches a very general widespread audience. Newspapers carry something of interest for nearly everyone; readership is quite diversified.

Newspapers carry both national and local advertising. Newspaper advertisements are either display or classified advertisements. Display advertisements are located throughout a newspaper. Classified advertisements, which are usually called want ads, are placed in a separate section near the back of a newspaper. Classified advertisements are generally less expensive than display advertisements but are not as visible.

Magazines allow advertisers to reach consumers nationwide. Magazines have a prestige that is not associated with newspapers. They are published for general audiences as well as for specialized audiences. Indeed, the trend is towards more specialization in content. It is now possible to advertise in magazines published solely for homemakers, computer users, car enthusiasts, stamp collectors, sports fans, runners, campers, do it yourselfers, investors, or almost any other group. There are also magazines for doctors, lawyers, plumbers, retail store managers, interior decorators, computer repair personnel, restaurant owners, and many other groups of professional and business people.

Radio and television are **broadcast media.** They reach more homes than any other type of medium. There is a radio in approximately 99 percent of the homes and cars in the United States. It is estimated that 98 percent of all homes have televisions.

Radio is a flexible medium. It is portable; a radio can go just about anywhere -- beaches, picnics, offices, backyards. Since radios are used extensively in automobiles, radio advertising is an excellent way to reach a large number of people. Because radio stations cater to various tastes by playing different types of music, such as rock, classical, country, or jazz, an advertiser can direct a message to a specific audience. An advertiser can also select the time of day that a radio advertisement will be broadcast.

PERFORMANCE OBJECTIVE 16

INFORMATION SHEET

The impact of television on consumers is stronger than any other medium. It is like a door to door salesperson calling on a prospect. It allows the visual demonstration of products and services. Television does not require viewer literacy. As with radio, an advertiser can select the time of day that an advertisement will be broadcast and direct a message to a selected audience. Different groups of people watch television during specific time periods. In local markets across the country, advertisers have found that even low budget productions can be a tremendous boost to business.

Outdoor and specialty media include outdoor signs and billboards as well as specialty items such as matchbooks and other inexpensive novelties. Outdoor signs or billboards offer an advertiser space for a simple message. The kinds of outdoor signs are poster, painted, and spectacular.

UNIT: DESCRIBING ADVERTISING

COMPETENCY: Discuss the process of buying advertising in the following media: newspaper, television, radio, magazine, specialty, direct mail, outdoor advertising.

PERFORMANCE OBJECTIVE 17:

Given discussion and materials on implementing advertising budgets, describe the process of buying advertising. The process of using advertising to fulfill the budgeted requirements of the company will be evaluated.

RESOURCES:

Lynch, Ross and Wray. **Introduction to Marketing,** Chapter 15.
Stull, W.A. and R.W. Hutt. **Marketing: An Introduction,** Chapter 10.

TEACHING ACTIVITIES:

Assign the following questions for class discussion:

1. Present at least two examples in which advertising to intermediaries might be necessary. What are the objectives of the advertising in your examples?
2. Which advertising media would you choose for the following products or services? Why?
   a. Local carpet cleaning service
   b. State Farm automobile insurance
   c. Tide (washing detergent)
   d. More (cigarettes)
   e. Magnavox (TV sets)
   f. A textbook
3. Using the sample list of media costs, discuss with class the costs and coverages of sample media rates.

EVALUATION

QUESTIONS:

1. Advertising is used for a variety of reasons. Which of the following is not a reason for advertising?
   a. To encourage people to try a product or service
   b. To encourage people to continue using the product or service
   c. To encourage control of advertising budget
   d. To strengthen the competitive position of a product or service

2. If you were introducing a completely new food product to consumers, which of the following advertising activities would be most appropriate?
   a. Signs
   b. Displays
   c. Trade shows
   d. Samples

ANSWERS:

1. c
2. d

PERFORMANCE OBJECTIVE 17

INFORMATION SHEET

Once the advertising budget is set, it can be broken down into planned monthly expenditures. Some companies base their monthly advertising budgets on the anticipated sales volume for each month. These sales estimates are based on the previous year's sales records plus any projected increases or decreases. For example, if May contributed 10 percent of last year's sales and no changes are expected, a business would plan to spend 10 percent of this year's advertising budget in May.

The Christmas season is an exception to the monthly budgeting approach. Many retail and mail order businesses generate 25 to 50 percent of their annual sales at Christmas. It would be unwise to spend 25 to 50 percent of the advertising budget during the month of December. Budget allocations can also vary because of the objectives that the business has established for its advertising program.

Advertising is a completely controllable business expense. This means that an owner or manager can control, through good planning and accurate record keeping, the amount of money that is spent on advertising. It also means that the advertising budget can be adjusted, for good reason, at any time during the year. Budget adjustments may be required in response to the actions of competitors or changing economic conditions.

A completed monthly tabulation record will provide the following information for each advertising account: (1) the planned expenditure for a particular month, (2) how much was actually spent, (3) the planned year to date expenditure, and (4) the year to date amount that has been spent. The totals of the four columns will reveal (1) whether a business was over or under budget for a particular month and (2) if it is over or under budget for the year.

After the objectives of an advertising program and an advertising budget have been established, the next step in the planning process is the selection of media that will effectively send a message to current and prospective customers. Most local business firms will find that newspapers, radio, or direct mail advertising meets their needs. A regional or national business may want to consider magazine, television, or outdoor advertising.

PERFORMANCE OBJECTIVE 17

SAMPLE LIST OF MEDIA COSTS

(As of July 1, 1987)

Radio Spots	Costs
WNOK-FM, Columbia 30 :30 spots ROS/BTA package to be used by 9/30/87	$ 960.00
WNOK-AM, Columbia 30 :30 spots ROS/BTA package	$ 180.00
WWDM-FM, Sumter, Columbia :30 or :60 spots	$ 1,000.00
WSCQ-FM, Columbia combination PAP plan of 50 :30 spots 6 AM Drive, 12 Midday, 12 PM Drive, 6 Evening, 6 Overnight to be used 3rd quarter, 1987	$ 1,090.00
WJMX-AM/FM, FLORENCE 20 :30 spots, AM/FM combo package 6A-7P TAP plan, must be used 3rd quarter, 1987	$ 500.00
WZLD-FM, Columbia 24 :60 spots 6 AM Drive, 6 Midday, 6 PM Drive, 6 Evening	$ 1,000.00
WZNS-FM, Florence, Myrtle Beach, Fayetteville 30 :30 6A-7P TAP spots to be used in 1987	$ 1,050.00
South Carolina Network 18 :30 or :60 spots one week on 55 stations	$ 3,000.00

Outdoor	Cost
Columbia Outdoor Advertising, Inc. 25 showing, 30 days (no production)	$ 1,610.00
Omni Outdoor Advertising 25 showing (7 boards), 30 days to be used 3rd quarter, 1987 (no production)	$ 1,645.00

PERFORMANCE OBJECTIVE 17

Direct Mail	**Cost**
Val Pak, Inc. 10,000 home mailing to zone of your choice pre-printed and delivered material only must not exceed 8 1/2 x 11 folded	$ 375.00

Newspapers	**Costs**
Columbia Black News, JuJu Publishing 1 full page ad, one insertion must be used during 1987	$ 688.00
Lexington Co. Newspapers, West Columbia Journal 4 1/4 page ads, one insertion each (may use combinations to make full page)	$ 851.00
The Richland Northeast 1/2 page ad, one insertion	$ 246.96

Cable Television	**Cost**
TCI - Telecommunications Inc. 4 week schedule, 8 spots per day on network of your choice: CNN, ESPN, MTV, USA	$ 896.00

Signs	**Costs**
Concept Unlimited One day rental of Electronic Message Board Sign 13 feet long, 8 feet off ground, 18" lettering	$ 400.00
Transit/Ads, Inc. 3 king size 30" x 144" ads 30 days (no production)	$ 279.00

UNIT: DESCRIBING ADVERTISING

COMPETENCY: Identify careers in advertising.

PERFORMANCE OBJECTIVE 18:

Given classroom discussion and other reference materials, select and describe a career in an advertising occupation. The discussion on careers should include entry-level positions.

RESOURCES:

Lynch, Ross and Wray. **Introduction to Marketing.** Chapter 15.
Stull, W.A. and R.W. Hunt. **Marketing: An Introduction.** Chapter 10.

TEACHING ACTIVITIES:

Assign the following:
Construct a career plan for an advertising position in which you are interested. If available, use the **Occupational Outlook Handbook** to help construct your plan, which should include the following information:

1. What is your career goal? Into which major specialized marketing area does your career goal fit?
2. Identify the specific duties and tasks involved in this position. Do you think that you would enjoy performing these tasks?
3. Outline the working conditions you will encounter in this type of position.
4. Describe your personal interests. If you have completed an interest inventory or test at your school, what did you learn about your interests that relate to your career choice? Are your interests compatible with the requirements of the position you plan to seek?
5. Discuss the local, state, and national employment opportunities for this type of position.

EVALUATION

QUESTIONS:

1. Which of the following is an example of a position in the advertising industry?
   a. Hard lines buyer
   b. Copywriter
   c. Store manager
   d. Production coordinator

2. Which of the following would <u>not</u> be a position in the advertising industry?
   a. Illustrator
   b. Artist
   c. Fashion buyer
   d. Media buyer

ANSWERS:

1. b
2. c

PERFORMANCE OBJECTIVE 18

INFORMATION SHEET

Of the many talents that lead to a career in advertising, writing ability and art talent are the most important. Does the applicant like to write or like to draw and paint? The applicant should keep samples of the best work on hand to show a potential employer. As beginning positions, copywriters and ad artists serve as basic entry jobs to the world of advertising.

If the applicant likes to write, and then is hired for an advertising opening, the trainee will be soon doing real ads and be launched on a career as a copywriter. If the trainee later develops a talent for sales, a career as an advertising sales specialist is a good alternative.

If the applicant likes to draw, especially figures and style subjects, a portfolio of art work will be interesting to an advertising art director. Good ad artists are hard to find and can quickly develop a lucrative career.

Both print and broadcast media vehicles employ media representatives to sell space and time to national advertisers and their agencies. Most "media reps" have exclusive rights to sell their vehicles within a defined territory. They regularly contact media buyers in agencies and make calls upon advertisers to provide a wealth of media information on the vehicles they represent. They sell their vehicles and the markets in which they operate against all competition. Media representatives are paid on a commission or salary basis, depending upon the vehicles they represent. Commissions usually vary from 5 to 15 percent of sales.

Related jobs in advertising:

1. Layout artist
2. Copywriter
3. Advertising salesperson
4. Account executive
5. Media buyer
6. Project manager
7. Time salespeople
8. Production specialist
9. Photographs
10. Research specialist

DESCRIBING VISUAL MERCHANDISING

UNIT: DESCRIBING VISUAL MERCHANDISING

COMPETENCY: Explain the two methods of visual merchandising: window and interior displays.

PERFORMANCE OBJECTIVE 19:

Given information from class and from observations of businesses, distinguish between interior and window displays. Describe the principles of visual merchandising. The discussion of visual merchandising should include a description of interior and window displays and include basic principles of visual merchandising.

RESOURCES:

Stull, W.A. and R.W. Hutt. **Marketing: An Introduction,** Chapter 13.

TEACHING ACTIVITIES:

1. If possible, schedule a field trip to a local shopping mall to observe the various window displays. Assign students to sketch out the basic patterns and features they see.
2. If possible, assign students to contact local retail store managers to get out of date or discarded point of purchase displays. These displays should be brought to class and used to illustrate basic principles.
3. Invite a local supermarket manager to speak to the class on the topic of point of purchase displays -- how and why they are used in food marketing.
4. Assign students to study the effect of lighting on visual merchandising -- what are effective methods of illuminating each type.
5. Assign students to construct miniature examples of visual merchandising displays, using normal paper construction materials.

EVALUATION

QUESTIONS:

1. Which of the following are examples of visual merchandising?
   a. Radio spots
   b. Window displays
   c. Television commercials
   d. Billboards

2. An important principle that applies to both interior and window displays is that they both
   a. should be changed frequently.
   b. have high start-up costs.
   c. should have elaborate props.
   d. have multi-colored lights.

ANSWERS:

1. b
2. a

PERFORMANCE OBJECTIVE 19

INFORMATION SHEET

Visual merchandising displays can be classified as window and interior displays.

Window Displays -- These displays are designed to attract attention and persuade potential buyers to come into a business. Merchandise is shown in such a way that shoppers can form an impression of the store. Window displays can feature a single item; an assortment of related items; a special arrangement of products, such as beachwear; or items that support a season such as Christmas. In order to be effective, window displays should be changed frequently, as often as every two to three weeks.

Interior Displays -- The major purpose of these displays is to attract attention and stimulate interest in purchasing the displayed items. In order to be effective, interior displays should convey their messages quickly, yet still include balance and proportion. With the trend in retail toward self-service, in store merchandising is increasing in importance. The basic kinds of interior displays are: island displays, end displays, wall displays, platform displays, shadow boxes, and point of purchase displays.

Visual Merchandising Principles -- 1. Plan the idea for a visual display to be as simple as possible. 2. Effective displays show prospective buyers how products will benefit them, so the products should be presented in ways that mean something to viewers. 3. The overall format of the display should reflect the value of the merchandise being displayed. 4. Displays should be changed frequently.

UNIT: DESCRIBING VISUAL MERCHANDISING

COMPETENCY: Discuss the use of indoor displays as used in grocery stores, gas stations, department and drug stores.

PERFORMANCE OBJECTIVE 20:

Given class discussion and information, describe the most important aspects of using indoor displays in grocery stores, gas stations, department and drug stores. The importance of good displays and their characteristics will be evaluated to include indoor displays.

RESOURCE:

Roth, Laszio. **Display Design,** Chapter 3.

TEACHING ACTIVITIES

Assign the following for class discussion:

1. List all the factors you feel make supermarket display effective. How is it unique from other types of store display?
2. Sketch or describe in detail how you would display merchandise in a clothing boutique's store front in order to set it apart from other store fronts surrounding it. Include comments on the role of the store front in merchandise display.

EVALUATION

QUESTIONS:

1. Good display designs are most important to which of the following type of stores?
   a. Mail order houses
   b. Computer service shop
   c. Shopping mall dress shops
   d. Auto repair shop

2. In supermarkets, two important considerations are
   a. food items must be clean and seen.
   b. food items must be fair and square.
   c. inside temperature should be freezing.
   d. layout should be like a maze.

ANSWERS:

1. c
2. a

PERFORMANCE OBJECTIVE 20

INFORMATION SHEET

Nowhere is good display more important to profits than in the American supermarket. Because supermarkets operate on a small percentage of profit, it is imperative that all items appear as tempting as possible.

Props used in supermarkets are usually confined to shelves, racks, and merchandise pyramids and fixtures are provided as a part of the total store decor. In displaying food items, two considerations are imperative. The first is absolute cleanliness. A pin or particle of dust might be overlooked in a fashion window but dust is never overlooked on a food item. The second consideration in displaying food items is to place them where they will be seen by the customer. Many impulse items, for example, are placed next to the checkout stand so that they fall into the range of vision of the customer who is waiting to check out. Most food items are accessible to the customer because food stores generally are self-service. It is desirable for food displays to be at eye level for easy viewing and physical accessibility.

The same product may be displayed at several points in the store in order to be next to many of the food items that it might accompany at a meal.

Signs are extremely important in supermarkets. Outside signs announce specials and sometimes are presented in almost a shorthand, understood only by the shoppers who want to know about as many sale items as possible. Signs are often used against the front window and must be easily read, colorful, and informative. Interior signs include aisle information signs as well as special sale signs. Color is important in the supermarket where bright, clear colors should prevail.

UNIT: DESCRIBING VISUAL MERCHANDISING

COMPETENCY: Discuss the basic display arrangements.

PERFORMANCE OBJECTIVE 21:

Given class information and discussion, the four basic display arrangements will be described and discussed: pyramid, step, zigzag, and repetition. The basic display arrangements of pyramid, step, zigzag and repetition will be described.

RESOURCE:

Roth, Laszio. **Display Design,** Chapter 3.

TEACHING ACTIVITIES:

1. Visit a mass merchandising store and a quality fashion store in your community. Compare the window displays at the two stores, and then answer the following questions concerning the two types of stores:
   a. What was in the window?
   b. What was used to attract attention?
   c. What special event was featured?
   d. What colors were used?
   e. Were price signs used?
   f. How many different items were placed in the window?
2. Find recent magazine articles relating to the use of emphasis, formal and informal balance in display.
3. Contact display equipment companies and obtain literature that describes basic equipment used in basic display arrangements. Assign students to report on this equipment.
4. Define and find three examples of pyramid, step, zigzag, and repetition display arrangements.

EVALUATION

QUESTIONS:

1. The pyramid arrangement tends to give feelings that are
   a. high spirited and joyful.
   b. stiff and formal.
   c. depressing and flat.
   d. Fluid and moving.

2. Which of the following requires deviation to break the monotonous effect?
   a. Step
   b. Zigzag line
   c. Pyramid
   d. Repetition

ANSWERS:

1. b
2. d

PERFORMANCE OBJECTIVE 21

INFORMATION SHEET

In the area of merchandise display, one of the principles is to allow one idea to dominate. This tends to enhance the selling message of the window. Here, more than in other areas of design, we emphasize the importance of the display area as a selling tool. It is not an artistic creation stimulating speculation and interpretation concerning its intent. The idea of a window must be clear and quickly received by the viewer. Details must be in keeping with the central idea or theme of the display window to enhance and immediately clarify the idea that prevails. The effective use of these aspects of harmony will produce a display that is concise in its message and pleasing to the eye of the customer.

There are four commonly used space divisions or types of arrangements by which the display person achieves proportion: (1) **pyramid,** (2) **step,** (3) **zigzag,** and (4) **repetition.**

The **pyramid** is a triangular arrangement with a broad base rising to a center peak. It is a common device to achieve proportion and may be used with any type of merchandise. It tends to give a display a stiff and formal feeling.

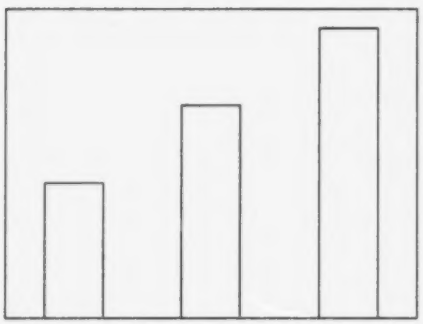
The **step** type of arrangement is a level elevation within the display area. It is effectively used as a side unit facing the center of attraction. It is more informal than the pyramid and is most effective when only three hems or steps are used. When steps extend evenly from either side to a midpoint within the display, the appearance of an inverted pyramid is in evidence. This aspect of proportion may, therefore, be easily combined with the illusion of the pyramid.

The **zigzag** type of arrangement is based on the principle of the double reverse curve and is particularly adaptable to wearing apparel due to the flexibility and ease of draping most fabrics. The zigzag requires equidistant spacing and precision. It may be especially effective when small accessory hems or steps are used, thereby eliminating vacant areas. An easily achieved zigzag effect is created by using material like yarn, rope, or ribbon to lead the eye throughout the total zigzag line.

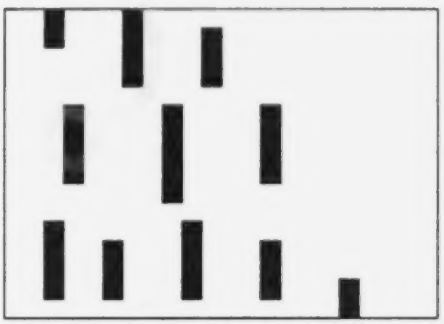
The **repetition** is simple in form. It makes use of hems or steps of the same general nature. It aligns all items in the same manner of height, spacing, and the angle at which they are placed. This type of repetitive arrangement requires deviations to break the monotonous effect that may result.

PERFORMANCE OBJECTIVE 21

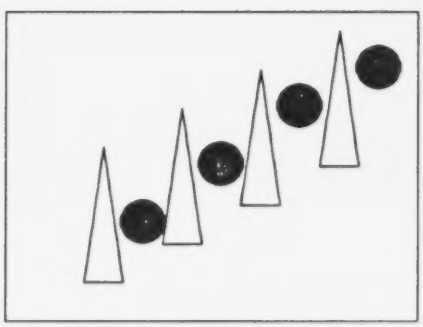
INFORMATION SHEET (Continued)



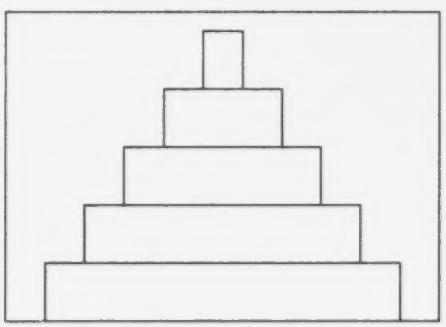
Step



Zigzag Line



Repetition



Pyramid

UNIT: DESCRIBING VISUAL MERCHANDISING

COMPETENCY: Describe the use of color and lighting in display and their importance.

PERFORMANCE OBJECTIVE 22:

The importance of color in a display will be discussed as it pertains to its ability to stop pedestrians and get their attentions.

RESOURCE:

Roth, Laszio. **Display Design,** Chapter 3.

TEACHING ACTIVITIES:

Assign the following:

1. Make this test: Stand outside your favorite store, count the number of people stopping in front of a window, listen to what they are saying about the display; absorb the feeling given by the audience, draw your own conclusions, and bring back to discuss with your classmates.
2. Visit your local paint stores or departments and discuss the mixing of paints. This will (especially if the interviewee will demonstrate the mixing) dramatically emphasize the makeup of colors and should implement the color wheel with practical information.
3. A review of color use in the local display departments by direct observation will give some appreciation for and knowledge of color and its application.

EVALUATION

QUESTIONS:

1. The most important factor used in creating a display is
   a. color.
   b. lighting.
   c. prop design.
   d. tools.

2. A color wheel indicates
   a. the colors of a true rainbow.
   b. how light reflects colors.
   c. approximate colors from mixing adjacent colors.
   d. the angles to use in a display.

ANSWERS:

1. a
2. c

PERFORMANCE OBJECTIVE 22

INFORMATION SHEET

A window display is a flashing picture to the average pedestrians. They approach it, observe it, and respond to it all in less than eleven seconds. This picture must be magnetic to bring customers into the store. A window display should represent the store and it should help sell goods. To do this, it must attract the eye and turn walkers into stoppers -- individuals who stop to examine the goods.

One of the strongest forces in stopping the pedestrian and making him want an item is the effective use in a display of color: The presence or absence of light as it is reflected or not reflected from the surface of an object. Color is one of the most important factors in creating a display. It is an invaluable selling tool because people are color conscious. Newspapers, magazines, radio, and television promote color constantly. Color helps to create new merchandise and the desire for it.

Color is defined here in its most simple state, rather than in the complex chemical and physical manner in which it exists. Color, as we understand it, is basically the presence or absence of light as it is reflected or not reflected from the surface of an object. Colors that we see as light colors, yellow, orange, and so on, reflect a great deal of light from their surfaces, therefore giving us presence of light to a high degree. Complete surface reflection on an object enables the object to appear as white. Objects that absorb a great deal of light appear as dark colors, such as purple. Complete absorption of light on the surface of an object makes the object appear as that which we know as black.

Colors are wave lengths of light. At one end of the spectrum of radiant energy are radio waves and infrared waves (waves of heat that are very long and invisible). At the opposite end of the spectrum of radiant energy are the invisible, very short, ultraviolet waves, followed by even shorter cosmic ray waves. Between the very long and invisible sound waves and the infrared waves at one end of the spectrum and the very short and invisible ultraviolet waves and cosmic waves at the other end are the waves of radiant energy that are visible. These waves are the components of visible light that we call color.

Color systems, when not applied, provide little practical knowledge or value. Display personnel should familiarize themselves with their essentials, but real knowledge comes from actually working with color. We soon learn that each color system is based on a limited conception. For example, the color wheel will indicate the approximate color that will result from mixing adjacent hues but it bears little relationship to prismatic color or that which results from the mixture of colored light.

PERFORMANCE OBJECTIVE 22

FOLLOW-UP ACTIVITIES

1. Students prepare a bulletin board showing some concept of color in display.

2. Students prepare a shadow box display using one of the color schemes studied.

3. Students visit a retail store and talk about color in display with person responsible for display. A written or oral report could be made on the information acquired.

4. Visit a local shopping area and decide which color schemes have been used to decorate the windows.

5. If a display area is available in the classroom, students may put up a display using one of the color schemes studied.

6. Construct a notebook that includes color samples obtained from a paint store. Select the colors that go together to form each of the color schemes studied. Include different tints and shades of the colors, and demonstrate how each scheme can look different with the change in value.

7. Sketch an original window display describing what colors of merchandise, background, and fixtures are to be used.

8. Conduct a survey to determine the color preferences of men, women, and children. Write or discuss how these preferences influence the use of these colors in specific displays.

9. Determine what colors are being used most often in displays for that particular season, and report the findings to the class.

10. Find color pictures from magazines that show monochromatic, complementary, analogous, and triadic color schemes. Make a notebook with these pictures, labeling each one.

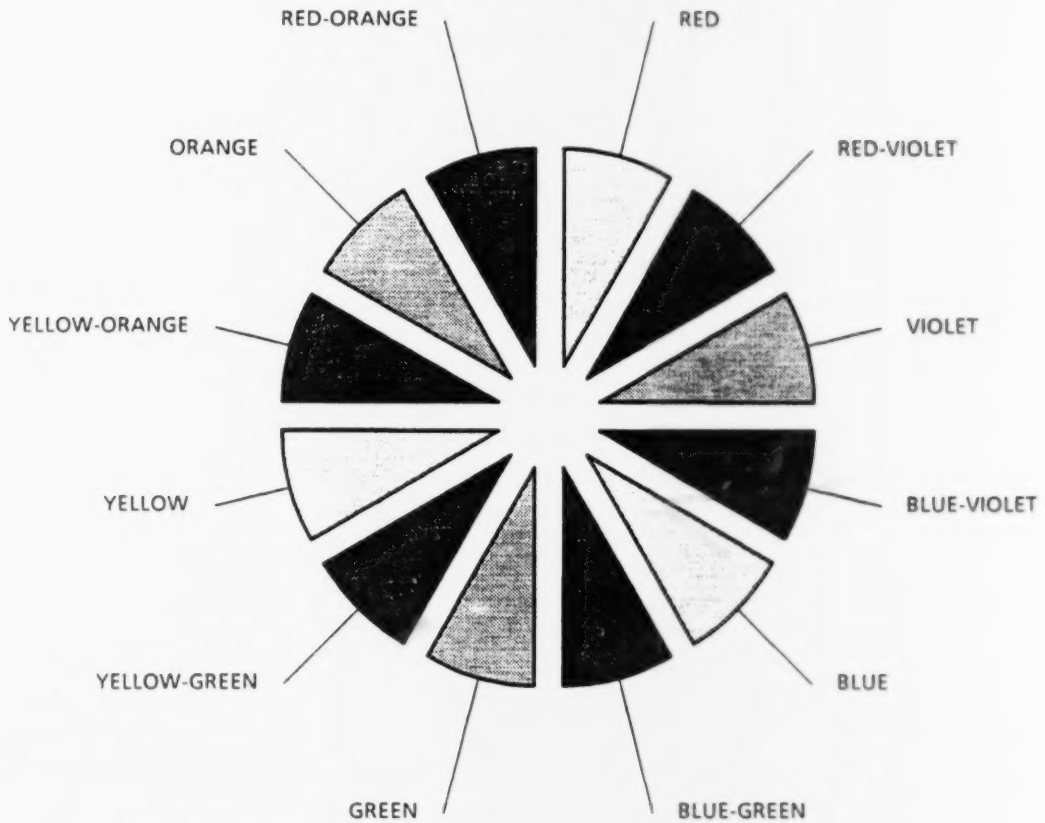
11. Using red, yellow and blue paints, mix these colors to produce the three secondary colors and the six tertiary colors.

12. Construct a value scale of one primary color showing the lightest tint to the darkest shade. Paints or color samples may be used.

13. List different color schemes that would be appropriate for the four seasons of the year and special holidays.

PERFORMANCE OBJECTIVE 22

COLOR WHEEL



PRIMARY COLORS (pure colors):

RED, BLUE, YELLOW

SECONDARY COLORS (created from equal amounts of primary colors):

GREEN, ORANGE, VIOLET

TERTIARY COLORS (created from equal amounts of one primary and one secondary color):

RED-VIOLET, BLUE-VIOLET, BLUE-GREEN, YELLOW-GREEN, YELLOW-ORANGE, RED-ORANGE

SHADES are created by adding black to colors. **TINTS** are created by adding white to colors. Colors next to each other are called **analogous** or **adjacent colors. Monochromatic** colors include shades and tints of a single color. Colors that are opposite each other on the color wheel are called **complementary** colors. Triadic colors are yellow-orange, red-violet, blue-green.

PERFORMANCE OBJECTIVE 22

COLOR WORKSHEET

1. List the three primary colors.

   a. _____

   b. _____

   c. _____

2. List the three secondary colors.

   a. _____

   b. _____

   c. _____

3. List the six tertiary colors.

   a. _____

   b. _____

   c. _____

   d. _____

   e. _____

   f. _____

4. Below are listed groups of colors. Each group is a color scheme. From these basic color schemes - complementary, analogous, triadic, and monochromatic - write the name of the scheme of each group.

   a. Yellow-orange
      Red-violet
      Blue-green

      a. _____

   b. Blue
      Light blue
      Dark blue

      b. _____

   c. Blue
      Blue-green
      Green

      c. _____

d. Red
Green

d. _____

e. Red
Yellow
Blue

e. _____

5. Describe how a tint is formed.

6. Describe how a shade is formed.

7. List three neutral colors.

a. _____

b. _____

c. _____

PERFORMANCE OBJECTIVE 22

ANSWER SHEET

1. List the three primary colors.

   a. *red*

   b. *blue*

   c. *yellow*

2. List the three secondary colors.

   a. *orange*

   b. *green*

   c. *violet*

3. List the six tertiary colors.

   a. *red-orange*

   b. *red-violet*

   c. *yellow-green*

   d. *yellow-orange*

   e. *blue-green*

   f. *blue- violet*

4. Below are listed groups of colors. Each group is a color scheme. From these basic color schemes - complementary, analogous, triadic, and monochromatic - write the name of the scheme of each group.

a.	Yellow-orange Red-violet Blue-green	a. *triadic*
b.	Blue Light blue Dark blue	b. *monochromatic*
c.	Blue Blue-green Green	c. *analogous*
d.	Red Green	d. *complementary*

e. Red
Yellow
Blue

e. *triadic*

5. Describe how a tint is formed.

White is added to a color.

6. Describe how a shade is formed.

Black is added to a color.

7. List three neutral colors.

a. *grey*

b. *beige*

c. *white, black*

UNIT: DESCRIBING VISUAL MERCHANDISING

COMPETENCY: Design point of purchase signs and letter signs.

PERFORMANCE OBJECTIVE 23:

Given guidelines from class discussion, describe how signs are designed and lettered.

RESOURCE:

Roth, Laszio. **Display Design,** Chapter 2.

TEACHING ACTIVITIES:

1. Evaluate the signs in four local department stores and describe the errors (if any) that appear. In determining their origins, classify the signs as to those provided by the manufacturer and those made locally by the retailer.
2. As a related project, invite a local sign shop manager to visit the class and discuss the types and prices of signs they create.

EVALUATION

QUESTIONS:

1. The left and right margins of a sign should not exceed
   a. one foot.
   b. two to three inches.
   c. one yard.
   d. one meter.

2. Letters and words on signs should be seen and read
   a. from left to right.
   b. from right to left.
   c. from top to bottom.
   d. from bottom to top.

ANSWERS:

1. b
2. a

PERFORMANCE OBJECTIVE 23

INFORMATION SHEET

Guidelines that might be discussed concerning effective sign layout are many and varied. Here are a few of the most common principles. Variations to the principles and additional techniques will be mastered as the displayman progresses in his lettering skill.

Special attention should be given to sign and showcard margins. The left and right margins should be exactly equal and usually should not exceed two to three inches. The top margin should be approximately one to one and one half the size of the side margins. The bottom margin should be the largest and should be twice the size of the side margins and one and one half times the size of the top margin.

The focal point of a sign should appear near the optical center of the sign which is exactly between the left and right margins and slightly above the top to bottom midpoint of a sign. Letters and words will obviously be seen and read from left to right. The same principles of proportion, balance, and emphasis discussed in the preceding chapters may be used when laying out a sign.

Line borders are often used to contain the eye when producing a showcard. These lines, which may extend completely around the sign or appear only in defining the corners of the sign, should stay within the prescribed margins suggested above. They often add a completed and professional appearance to the sign and may be added to balance the contents of the sign if necessary.

Showcards are a necessary part of any display area and are most impressive and effective when produced individually by the person creating the display so that their layout, lettering style, and total effect may be in keeping with the mood of the display.

As the display person's skill increases in the area of lettering, his showcards will reflect his creativity and imagination. Therefore, most restricting rules of lettering will not be set forth here.

PERFORMANCE OBJECTIVE 23

ABCDEFGHIJKLMNOPQRSTU	14	abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOP	18	abcdefghijklmnopqrstuvw
ABCDEFGHIJKL	24	abcdefghijklmnopq
ABCDEFGHIJ	30	abcdefghijklmn
ABCDEFGH	36	abcdefghijkl

UNIT: DESCRIBING VISUAL MERCHANDISING

COMPETENCY 24

PERFORMANCE OBJECTIVE: Dress mannequins.

Given class demonstration and materials, dress mannequins. The mannequins when finished should be dressed correctly for the occasion. If materials are not available, the procedure used to dress mannequins will be described.

RESOURCE:

Roth, Laszio. Display Design. Chapter 2.

TEACHING ACTIVITIES:

1. Invite the display manager of a local department store to the class to demonstrate the various types of mannequins that the store uses in displays.
2. Assign students to contact manufacturers to get price lists of display equipment, including mannequins. This information should be shared with the class, along with minor repair procedures that can be used on mannequins.
3. Assign students to dress mannequins.

EVALUATION

QUESTIONS:

1. In which of the following displays are traditional mannequins most likely to be used?
   a. Children's apparel
   b. Women's fashion apparel
   c. Sports apparel
   d. Men's fashion apparel

2. When dressing a mannequin, which part is dressed first?
   a. Head
   b. Feet
   c. Upper torso
   d. Lower torso

ANSWERS:

1. b
2. a

PERFORMANCE OBJECTIVE 24

INFORMATION SHEET

Mannequins in the display of apparel tell customers that fashionable merchandise is available to them and paint a picture of the garment on them. Display of mannequins creates a fashion atmosphere in the store, shows fashion coordination, and helps to sell complete coordinated outfits.

Before assembling and dressing the mannequin, it is necessary to have a theme. Select a background to create the desired illusion. The use of a background is just for atmosphere; do not let the mannequin play second fiddle to it.

After deciding upon a theme, select the clothing to be used, making certain that it is well pressed and in fashion. Accessories should be carefully chosen to complete the costume. Many times, the use of these accessories will result in a total sale of the display.

Mannequins are of different kinds: standing, kneeling, reclining and action. There are mannequins with and without arms. Bust forms also may be used. Most mannequins have breaking points at the shoulder, wrist, waist, and thigh. Because mannequins are not flexible like the human body, it is often necessary to "break" it at these points.

When dressing a mannequin, start by removing the wig or covering the wig with a plastic bag to protect it. Put on the lower half of the costume first, such as a skirt or slacks. When putting on slacks, the legs must be removed from the mannequin, inserted into the slacks, and fastened back onto the body. Then, the clothing can be pulled up over the hips.

A shell, or blouse, is put onto the shoulders of a mannequin after the arms have been removed. Some pinning of a garment is usually necessary. Use as few pins as possible but be sure of a perfect fit. Be sure that the garment is pinned in the way the designer meant the lines to flow. The use of tissue paper may be desirable where more fullness is needed. This may be used to give a skirt a blown out effect or to increase a bustline. Check to see that the skirt hangs evenly and is well centered. To avoid the hem showing from the front, pin it higher in the back.

Change a mannequin as often as possible. Surveys show that customers return to shop every ten days. On each visit, show them something new to stimulate their interest.

UNIT: DESCRIBING VISUAL MERCHANDISING

COMPETENCY: Describe and discuss the basic tools of visual merchandising: paints, props, staple guns, lighting fixtures, mannequins, etc.

PERFORMANCE OBJECTIVE 25:

Given equipment (if available) and class demonstration, basic tools of visual merchandising will be described and evaluated.

RESOURCES:

Roth, Laszio. *Display Design*, Chapter 2.
Carty, Richard. *Visual Merchandising, Principles and Practice*, Chapters 4 and 5.

TEACHING ACTIVITIES:

1. Assign the following:
   Using a given theme, given props, and given space or shelf, create a soft line and then a hard line display, changing only the merchandise, the lighting, and the arrangement of the merchandise according to display principles. Create these displays in class as a demonstration concerned with the differences between soft line and hard line displays.

EVALUATION

QUESTIONS:

1. In the jargon of visual merchandising, "horses" are
   a. special lighting bulbs.
   b. removable legs to form a table.
   c. styles of backdrops.
   d. color wheel examples.

2. A pantograph is used to
   a. draw ovals and geometric shapes.
   b. trace artwork and photographs.
   c. style pants of all sizes.
   d. color art work.

ANSWERS:

1) b
2) b

PERFORMANCE OBJECTIVE 25

INFORMATION SHEET

The most practical piece of equipment for the display designer is a large working table. A 4-by-8-foot piece of 3/4-inch plywood, covered with board and placed on "horses" (removable legs) can serve as an inexpensive worktable. Here are some of the basic equipment and materials you will need:

A tracing box. This is a light box with frosted glass for a top, and incandescent or fluorescent lamps mounted in the box. It is used to trace artwork and photographs or to look at transparencies and slides.

A small **silkscreen** setup, which can be used to produce quality sign cards and posters in full color.

Shelves and bins to hold art materials and equipment. These can be built easily by a handy designer.

Basic Art Supplies

Tracing papers (or pads).

Visualizing pads.

A strong **twenty four inch metal ruler** to use as a cutting guide.

A **T square.**

Forty five and ninety degree **triangles.**

A **compass and divider.**

Some **templates:** ovals and other geometric shapes.

A **pantograph:** a device used to draw enlarged or reduced duplications of artwork.

A wide assortment of **brushes,** including sign writer brushes.

Opaque **water color paints** (tempera or showcard colors) in jars.

Acrylic paints (for glass and plastics).

Black dense **india ink** (waterproof).

Some **pencil leads** with holders (HB, 2B, 6H).

PERFORMANCE OBJECTIVE 25

INFORMATION SHEET (Continued)

A complete set of **chisel point markers.**

A set of color **Pentels.**

Lettering and ruling **pens** (or a Rapidograph set).

Rubber cement and **thinner.**

White glue.

Masking tape.

Papers and **boards** (optional).

Tools

In addition to the standard hand tools used by most crafters (hammers, screwdrivers, pliers, handsaws, drills, scissors, mat knives) one of the most important hand tools of the display designer is the stapler or the staple gun. This simple tool is used for fastening, attaching, and fabricating displays and display materials.

PERFORMANCE OBJECTIVE 25

PROPS

In addition to the basic fixtures, the display artist has at his disposal a classification known as props. These are the items that lend the creative spark, the individual touch, the store signature to a display. They may be purchased commercially, made in the store, or pulled from yesterday's trash. Any unusual or everyday object or discard can, with ingenuity, be turned into a display prop. Basically, anything has the potential for becoming a display prop; it is what the display artist sees in it, whether color, shape, or texture, that will determine its eventual use. The unusual nature or unexpectedness of a prop will cause customer comment. Junkyard finds of abandoned machinery placed in a display window could make a customer wonder "what is it?" and enter the store to ask.

Props are an important component of any display, but they are especially valuable for ready-to-wear. Displays in the home-furnishings area such as domestics, housewares, and gifts depend heavily on the props to pull the display together. For example, a display of clocks would not mean much by itself, but add some natural-wood crates in various sizes, some greenery, and you are telling a natural story. In ready-to-wear, props also serve to enhance the display.

This may be used to create a mood and environment for a window display -- even a corner bridal window. The bridal gown and the attendant's gown could be given a country feeling through a careful selection of materials and colorations to them through a careful selection of materials and colorations. The story would really come alive with the addition of props of a barnyard complete with hay, a cow, sheep, and the like.

FIXTURES

Fixtures lend life and interest to merchandise and allow it to be shown in a new perspective to the customer. The category of fixtures is broad and includes such items as stands, millinery heads, and forms. The size of the store and the display budget will be determinant as to how many of these items will be available to the display artists.

THE STAND

The primary function of a stand is to add height to a display and enhance the appearance of the merchandise. They are usually found on the top of a counter, case, round, or gondola. Metal is the most common material for a stand, but they are also constructed from plastic. The metal stand has an adjustable rod which allows it to increase in height to accommodate different sizes of merchandise.

PERFORMANCE OBJECTIVE 25

THE SHIRT TOP

In the men's area the most common top is the shirt top which is of two types: metal and balsa wood. The metal top is a plate with an upturned lip on the bottom which allows a packaged shirt to be displayed at an angle to the customer's viewpoint. A tie may be added to create a total look.

MANNEQUIN SIZES

Mannequins come in sizes which correspond to ready-to-wear sizes, and the appropriate-size merchandise should be used on the appropriate-size mannequins. This is not always possible especially with the more expensive merchandise, such as designer clothes, so that pinning may be necessary. Pinning is the procedure of altering a garment, without physically changing it, so that it appears to fit the mannequin. This can only be done in displays where the customer and the public cannot see the backs of the mannequins, for this is where the pinning is done. This is commonly used in advertising photography.

Whether it is pinned together or the correct size, the merchandise should be clean, new, and freshly pressed before going on the mannequin. Once on the mannequin, it is the responsibility of the display artist to see that it fits correctly and hangs properly. Each mannequin should look like he or she stepped out of the proverbial bandbox.

LIGHTING

Proper lighting is essential to a store for several reasons. The most important is that the customer must see the merchandise. The majority of the lighting in a store will be from fluorescent tubes because it looks more like daylight than incandescent lighting. It gives off less glare and is cooler. The long fluorescent tubes are easily installed in cases and ceilings. The tubes last longer than incandescent and give off far more light for the amount of electricity consumed.

For concentrated lighting on specific parts of a display, spotlights will be used with one-hundred to three-hundred-watt bulbs. These act to highlight merchandise in a display or act as mood lighting. The main problem with spotlights is their intense heat.

Spotlights are flexible in their positioning, so the last step in doing any display is to reset the lights so they are highlighting the proper areas of the display. Colored filters may be used on the spotlights to create various effects, such a using a blue filter to achieve a cool mood in a display. The use of colored lights or filters will have an effect on the apparent color of the merchandise.

PERFORMANCE OBJECTIVE 25

LIGHTING INTENSITY

It is best to underlight rather than overlight. Glare must be eliminated, especially in windows and in cases where the glass will reflect the light. In stores wishing to save money and conserve energy, lighting is held to a minimum. This means that lights in the windows do not come on until dusk and then go off as soon as the store is closed. This creates a challenge for visual merchandising people in that windows must be made as effective and eye-catching as if they had lights in them.

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